

# El Templates

As of 5/9/2011

<b>Holds</b>	
Unfilled Holds(test)	List of patrons with unfilled holds by pick up library and hold placement date range. Display of pickup library, title, author, patron barcode, patron name, hold type, and hold placement date.
Cleans Holds Shelf - HMMPL (clone)	Determines cancelled holds from previous day. This report will also include staff cancelled holds.
Idle Holds	Holds older than given date that remain unfilled.
Hold Based Purchase Alert New	Count of unfilled holds on titles by pick up library. Display of pickup library, title, author, number of holds, number of copies library owns, and date first
Hold count by date range	Count of filled holds on titles by pick up library. Display of pickup library, number of holds without canceled holds.
Stale Hold Report (ESI version)	List of patrons with unfilled holds by pick up library and hold capture date range. Display of pickup library, title, author, patron barcode, patron name, hold type, and hold placement date.
Idle Holds - Filters Added	Holds older than given date that remain unfilled. Checks Capture , Fulfillment, Hold Cancel and Hold Expire date fields to ensure they are null.
<b>Customer</b>	
Count of New Users by Date, Permission Profile	A count of new users registered within a given date range. Filter by home library, between dates.
Patron requested checkout history - No Duplicate Rows	Report for patrons who request to know what they have recently checked out from the library. Added first value transform on title and authro fields to ensure duplicates removed
List Users by Profile Group	List of Users at selected libraries, broken down by Profile Group, Library Card, Name, Address and Expiration Date.
Count of new library cards by profile.	List of new card per specified date range.
Total Users by Library	Count of Users at selected libraries.
Patron Mailing Addresses	Report of all patrons with names and mailing addresses for mailing label creation. Filter by "home library" Organizational Unit ID
Aged Claims Returned using Circ source. Corrected to work right HMMPL	This report will show all items that are currently with a fine stop reason of "CLAIMSRETURNED" and a check in date and time of null. The output is org name, call number, title of item, item barcode, shelving location, copy status, last edited timestamp, first and last name of customer last holding item and
List of items chosen by owning library, Item copy status, Multiple fine stop reasons	A list of items chosen by owning library, Item copy status, multiple fine stop reasons. Output is library name, call number, title, item barcode, shelving location, status, lasted edited date, customer first and last name, customer barcode. Commonly used for Claims returned
Patron requested checkout history	Report for patrons who request to know what they have recently checked out from the library.
Inactive Patrons	Patron Name, Barcode listing for those with "Inactive" flag set.
Patron Barcode Range	Listing of all barcodes in use by patrons, filtered by library
Count of patrons by Township Stat Cat	For use only by Franklin County Public Library on the Legacy User Cat 2 Statistical Category. May be used as an example for other libraries wishing to report on statistical categories.
Library Email Distribution List	CSV format can be used for import into Outlook, Gmail, etc.

Expired Patrons by Date Range	Patron Name, Barcode listing for those with Expired Dates
Patrons with greater than 3 claims returned items	A listing of patron barcodes with more than 3 claimed returned items. Filter by home library.
<b>Item Records</b>	
List of "Claims Returned" items with claiming patron	Listing of all items marked "Claims Returned" and the patron who claimed the item returned
Daily list of out-of-circ items	List of items by status (lost, missing, damaged and Bindry) with home shelving locations, notes and ISBN. This is run daily.
Monthly Items Added by Circ Modifier	Count of Items added at selected libraries by month, broken down by Circ Mod.
Adult Materials Usage Report (HMMPL)	List items with total use count filtered by library, creation date, shelving location and on and before a selected date. This is for use counts circulated from Evergreen and SIRSI.
Monthly Items Added by Shelving	Count of Items added at selected libraries by month, broken down by shelving
List of Items with a Total Use Count by Item Creation Date and legacy SIRSI counts (HMMPL)	List items with total use count filtered by library, creation date, shelving location and on and before a selected date. This is for use counts circulated from Evergreen and SIRSI.
List of Items with a Total Use Count by Item Creation Date and legacy SIRSI counts limited by number of circs	List items with total use count filtered by library, creation date, shelving location, under a selected number of circs and on and before a selected date. This is for use counts circulated from Evergreen and SIRSI.
List item with a Total Use Count by Item Creation Date by entering the barcode of the item HMMPL	List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by barcode. This is for use counts circulated from Evergreen and SIRSI
List of items by copy status and locations	Listing of all items by copy status with filter on Copy Location and status. Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
List of Items Deleted in the last X days	List of Items by deleted after X days ago. Display of library, deletion date, title, author, call number, barcode and circ modifier
List of Items added in the last X days	List of Items by added after X days ago. Display of library, deletion date, title, author, call number, barcode, status. location and circ modifier
Items received for hold by Date	Count of Items received to other libraries to fulfill a hold by date.
Items transited to other libraries for	Count of Items transited to other libraries to fulfill a hold by date.
Total Items Count by Library	Count of total items at selected library
List item with a Total Use Count by Item Creation Date by entering the multi-barcode of the item HMMPL	List items with total use count filtered by library, creation date, shelving location, on and before a selected date selected by multi-barcode. This is for use counts circulated from Evergreen and SIRSI
List of items by copy status, circ modifier, locations and stat categories	Listing of all items by copy status, circ modifier and copy location; with filter on Copy Location and status. Display is Status, Title, Author, Barcode, Call Number, Circulation Mod, Shelf Location, creation date, last edited date, publisher and
Daily list of out-of-circ items without deleted items	List of items by status (lost, missing, damaged and Bindry) with home shelving locations, notes and ISBN. This is run daily.
List item with a Total Use Count by Item Creation Date by entering the barcode of the item HMMPL W/Circ	List items with total use count filtered by library, circ mod, creation date, shelving location, on and before a selected date selected by barcode. This is for use counts circulated from Evergreen and SIRSI
Count of Items added in the last X months	Count of Items by added in the last X months. Display of library, circ modifier and count.
Count of Items Deleted in the last X	Count of Items by deleted after X days ago. Display of library, circ modifier

List item with a Total Use Count by Item Creation Date by entering the barcode of the item HMMPL W/Circ	List items with total use count filtered by library, circ mod, creation date, shelving location, on and before a selected date selected by barcode. This is for use counts circulated from Evergreen and SIRSI
List of items by copy status, circ modifier and locations	Listing of all items by copy status, circ modifier and copy location; with filter on Copy Location and status. Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
List of "Claims Returned" items	Listing of all items marked "Claims Returned"
Items Count Created On or Before a Date	Count of total items created on or before a date by library and item stat cat filters with a display of library, circ modifier, stat cat, and shelving location.
Total Items Count by Library	Count of total items at selected library broken down by circ mod and shelving
Out-of-circ items without deleted items	List of items by status (lost, missing, damaged and Bindry) with home shelving locations, circ modifier, notes and ISBN. This is run daily.
Item Barcode Listing	List of all item barcodes in use
Listing of Items added between chosen date	Listing of Items by added between two chosen dates. Display of library, circ modifier, author, title, call number, barcode, creation date.
List of items by copy status and locations Filtered by Last Edit Date	Listing of all items by copy status with filter on Copy Location and status. Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
List of items by copy status and locations - filter deleted	Listing of all items by copy status with filter on Copy Location and status. Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
<b>Overdue Notice Templates</b>	
Long Overdues "Between" dates and	Used for creating 28 and 45 day overdue mail merge
Items overdue since before given date	Used for finding items "long" overdue.
Recurring Overdue Manifest	A recurring report (daily, weekly, etc. - you choose) listing all overdue items at a particular library with relevant patron/item information.
Long Overdues older than a particular date and Circulating Library	Used for looking at the items that were due before a certain date. Run the first time for items 40 days overdue (40 days prior to today's date), and run daily to do prep work for 45 day notices.
<b>Bibliographic Records</b>	
Total Bib\Titles Count by Library	Count of total Bib\titles at selected library
List of Items A to Z with barcode	List of items by status, call number, title, barcode, shelving location, copy status and last edit date. Note: if you run an intransit status from this template, the date last edited is not the date the item was put in transit. You must use a different template type for transit date information.
<b>Circulation</b>	
Monthly Circ by Circulation Modifier, Shelving Location and Owning Library	Count of circulations at selected libraries by month, broken down by circ modifier and Shelving Location.
Non Cataloged Circulation for El Libraries (2010-11-22)	Select the library and the date range. See the number of circulations by type at each library selected.
Monthly circulation counts of items owned by one library, and circulated elsewhere shows circulating library	Breakdown of circulations by selected timeframe. Shows circulating library, number of circs, and shelving locations. Filtered by checkout date, owning library and circulating library.

Monthly circulation counts by shelf location (All Shelving Locations -	Breakdown of circulations by selected time period. Filters by checkout date and circulating library. Does not include intra-system transits (branch-to-branch).
Monthly Circ by Circulation Modifier and Shelving Location and circ modifier	Count of circulations at selected libraries by month, broken down by circ modifier and Shelving Location.
Count of circulations by patron profile	Count of circulations grouped by patron profile group on a monthly basis.
Monthly Total Circ by Circulation	Count of circulations at selected libraries by month.
Monthly Circ by Circulation Modifier	Count of circulations at selected libraries by month, broken down by circ
Monthly Circ by Circulation Modifier and Shelving Location	Count of circulations at selected libraries by month, broken down by circ modifier and Shelving Location.
Total Circ date	Count of circulations at selected libraries by selected date.
Patron by Patron Items Out Count	Count of items out by patron barcode, Patron Home Library, Circulating Library. Filtered by Library Org Unit. (CSV Output Recommended)
Monthly Total Circ by Profile for PLAC	Count of circulations at selected libraries by month by profile PLAC and Zip.
Daily Circ by Circulation Modifier and Shelving Location	Count of circulations at selected libraries by day, broken down by circ modifier and Shelving Location.
Claims Returned Items Between Dates	Listing of item titles, barcodes and call numbers along with patron who claims item was returned between a given date range.
Item Usage Count by Barcode	Count of checkouts for a user supplied barcode.
Non-Cataloged Circulation Counts	Count of in house non cataloged circulations by type. Filter by circulating library. Lists counts for all non cataloged types with > 1 circulation.
Monthly circulation counts by shelf location (All Shelving Locations) listing	Breakdown of circulations by the day of the week. Includes a checkout date filter and circulating library filter.
Count of circulations by patron profile	Count of circulations grouped by patron profile group on a monthly basis.
In House Use by copy location	A count of in house uses, grouped by copy location.
Monthly circulation counts by shelf location (May 2010 Revision)	Breakdown of circulations by the day of the week. Includes a checkout date filter, copy location filter, and circulating library filter.
Monthly circulation counts by shelf location (All Shelving Locations)	Breakdown of circulations by the day of the week. Includes a checkout date filter and circulating library filter.
<b>Inventory</b>	
Count of items on day run by locations	Count of all items with filter status to be used for inventory.
List of items by copy status, circ modifier and locations and SIRSI-Evergreen circ count HMMPL, Pub, Pubdate - Laura G.	Listing of all items by copy status, circ modifier and copy location; with filter on Copy Location and status. Display is Status, Title, Author, Barcode, Call Number, Circulation Mod, Shelf Location, SIRSI-Evergreen total, creation date, last edited date, publisher and Pub Date Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
List of items by copy status, circ modifier and locations and SIRSI-Evergreen circ count HMMPL - Laura G.	Listing of all items by copy status, circ modifier and copy location; with filter on Copy Location and status. Display is Status, Title, Author, Barcode, Call Number, Circulation Mod, Shelf Location, SIRSI-Evergreen total, creation date and last edited date Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable
Count of items in a "status" on day run	Count of all items by copy status with filter status to be used for inventory.
List of items by copy status, circ modifier and locations with status as first field mark II	Listing of all items by copy status, circ modifier and copy location; with filter on Copy Location and status. Display is Status, Title, Author, Barcode, Call Number, Circulation Mod, Shelf Location Available, Bindery, Cataloging, Checked out, Damaged, Discard/Weed, ILL, In process, In transit, Lost, Missing, On holds shelf, On order, Reference, Reserves, Reshelving, Temporarily Unavailable

Weekly Circ by Circulation Modifier and Shelving Location	Count of circulations at selected libraries by week, broken down by circ modifier and shelving Location.
Items to weed by circ modifier, last checkout	A listing of items due for weeding. Filter by circ modifier and last checkout date. Enter "minimum" last checkout date in YYYY-MM-DD format.
<b>Annual Report Templates</b>	
Q10 - 13 Registered patrons for annual	Q10 - 13 Registered patrons -- resident, non-resident, recip borrower, PLAC,
Q 57 a-b - Circ count by shelving location	Q 57 a-b - Circ count by shelving location. Sort by shelving location to separate # of circulations of children's materials. NOTE: This report includes the shelving locations as named by other EI libraries.
Q117 PLAC loans	Count of circulations at selected libraries by Time Range by profile PLAC and Zip includes alert message
Q58a-f Holdings	Count of items at selected library by circ mod
Q164a-e - Circ count by material type (audio, video, book, magazine, other)	Q164a-e - Circ count by material type (audio, video, book, magazine, other)
<b>Collection Agency</b>	
Long Overdues Greater Than so many	Used for looking at the items check out greater than some number of days
Long Overdues "Between" dates and	Used for creating 28 and 45 day overdue mail merge
Long Overdues Greater Than so many days and Circulating Library shelving	Used for looking at the items check out greater than some number of days
Collections Report - Mooresville	Customized collections report for MVPLM requested by Lori Becker
<b>Transits</b>	
Where are my items? (Revision 4)	A report to locate items that are currently in transit, where they are at the time of reporting, and an anticipated due date on the current open circulation. Filters items with "available" status.
Transit Count (Outbound)	A count of transits FROM a particular library during a given date period
Transit Count (Inbound)	A count of transits TO a particular library during a given date period
<b>Stat Cat</b>	
Patrons by Township Statistical Category for West Lebanon	Custom report for West Lebanon Public Library. Lists names by township, lists record creation date
Patrons by Township Statistical	Custom report for Butler Public Library. Lists names by township
Stat Cat Search HMMPL	List items with total use count filtered by library, is deleted and Stat Cat ID. This is for use counts circulated from Evergreen and SIRSI
Circulations by Township Statistical Category	Custom report for Butler Public Library. May be suitable as an EXAMPLE for creating similar reports.
<b>Customized Branch Specific Templates</b>	
Count of Non-cataloged Circulations	Filter by date, Non-cat Item Type, Owning Library
Count of circulations by patron profile,	Count of circulations grouped by patron and circ modifier on a monthly basis.
Patrons by Township Statistical Category for Flora-Monroe Twp. Public	Custom report for Flora-Monroe Twp. Public Library Lists names by township. Also includes patrons' addresses and record creation dates.
WWPLW - Circ's by Home Library Statistical Category with location	Count of circulations for each entry in the Hamilton County Libraries for a given time period.
GDCPLG Overdue Call List - Paper reduction (one day - relative)	A recurring report listing all overdue items at a particular library with relevant patron/item information. (Daily, with patron info first)
WWPLW - Circ's by Home Library Statistical Category	Count of circulations for each entry in the Hamilton County Libraries for a given time period.

MVPLM Amnesty Counts	A count of checkins for a particular org unit with a due date less than some date, and a checkin time between a given amnesty period.
PTPLP Local newsletter preference	A listing of patrons along with their newsletter preference
BZPLB - Circulations by month, shelving location	Count of circulations at selected libraries by month and shelving location. Select 1 or multiple shelving locations.
<b>Telephone Reports</b>	
Count of Outbound Calls (revised)	A count of outbound calls for a given date range, at a particular library
Count of Outbound Calls Monthly stats	A count of outbound calls for a given date range, at a particular library
List of Calls (revised)	A list of calls for a particular day and library, with patron information
Failed Calls (Revised v3)	A listing of failed calls, along with patron information, for a particular library on a given date